Performance Plan – Creating a Performance Plan by Copying from an Existing Plan

Step 1: Go to your MyPerformance Main Page (see screen below).

Step 2: At the ‘Create New Plan’ section, click on the drop down arrow for ‘Choose a Plan Type’ (arrows below):

Step 3: Once you click on the drop down arrow for “Choose a Plan Type,” several choices appear. Select ‘DoD Performance Management Appraisal Program’ and click on ‘Go’ (see arrows below):
Step 4: After you click on the ‘Go’ button, the screen below will display and the ‘Copy from Existing Plan’ function is now available (see arrow below):

Step 5: Once you choose the option to copy from an existing plan, the MyPerformance Tool will query you to choose the ‘Appraisal Effective Date’ from which to copy (i.e., 1 June __). Once the appropriate ‘Appraisal Effective Date’ is chosen, click ‘Find.’
Step 6: The MyPerformance Tool will then ask you, “Do you wish to copy the plan of ________?” If correct, choose ‘Yes’ option.

Step 7: Upon reviewing the ‘Plan’ tab, you should see the fields populated within Step 2 and Step 3 with the information for the appraisal year you had chosen to copy. The elements/standards should be reviewed in full in order to ensure they populated as desired and are still appropriate for the current rating cycle.

Step 8: Following Step-7, you should proceed as would normally be required when creating a performance plan in the MyPerformance Tool. To complete the performance plan’s development, you should proceed to Step 4 to secure the required approvals (both Rating Official and Higher Level Reviewers), in addition to the Employee’s acknowledgement.